

AFO 159 - Data dictionary/Template management for holdings

159.1 Introduction

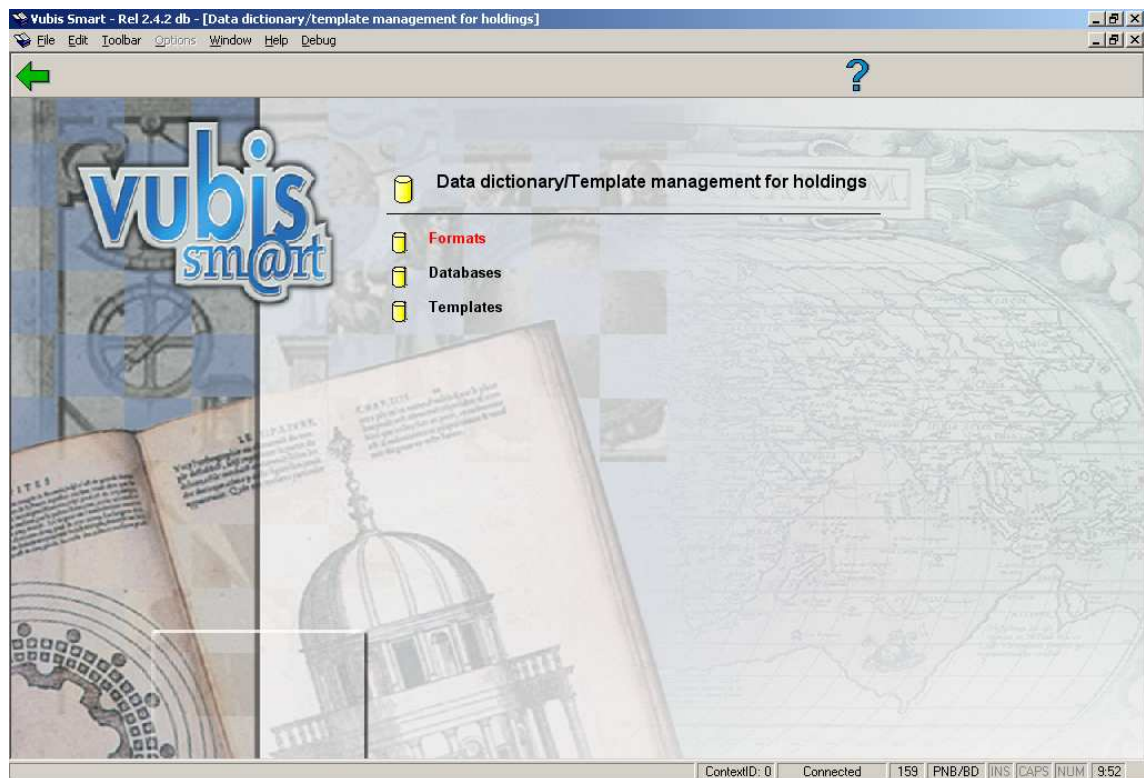
With this AFO you can maintain formats, databases and templates for holdings.

A holdings format contains the definition of which fields are part of a holdings record, which subfields each of the fields can have, what the characteristics are of fields and subfields, etc. This is similar to format definitions for bibliographic records and authorities.

Note

When the Vubis Smart system is installed the MARC21/H and UniMARC/H formats, databases and templates are already defined. You are advised not make any changes to these, nor remove them. It is allowed to make small modifications to the templates (like color, wording).

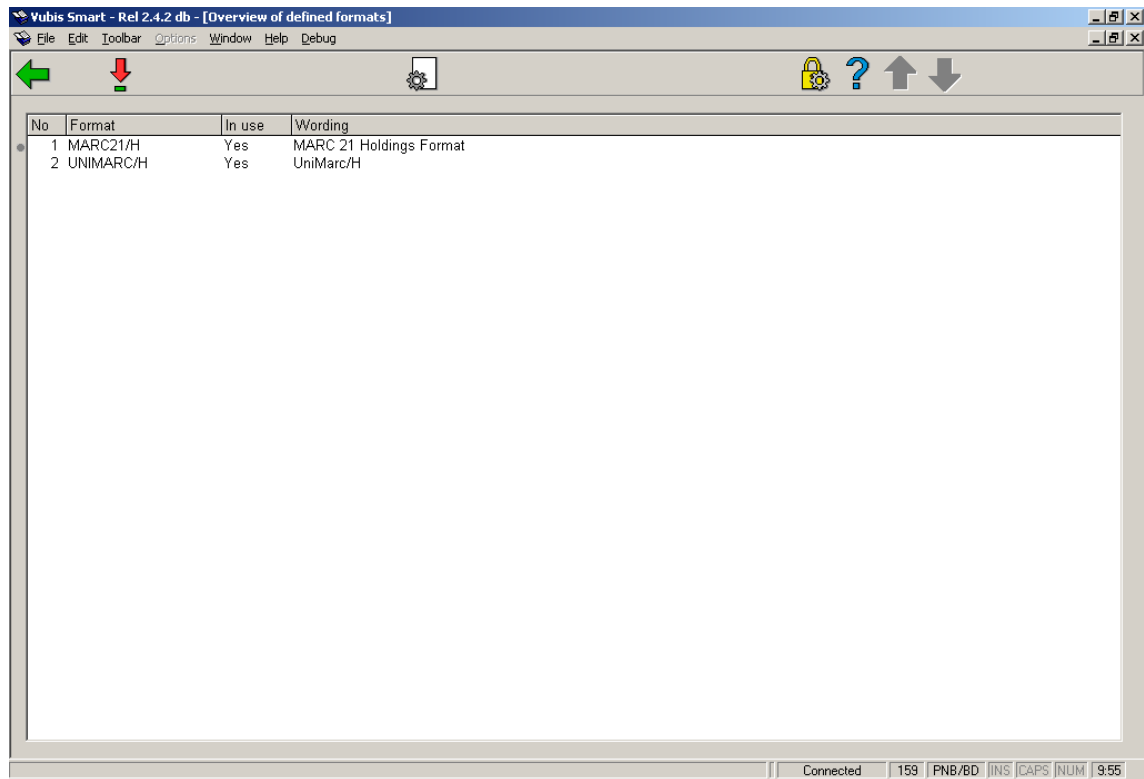
After choosing this AFO the following menu is presented:



The various options are described in the next paragraphs.

159.2 Formats

Go to AFO 159 and choose Formats, this will result in a list of holdings formats defined on your system:

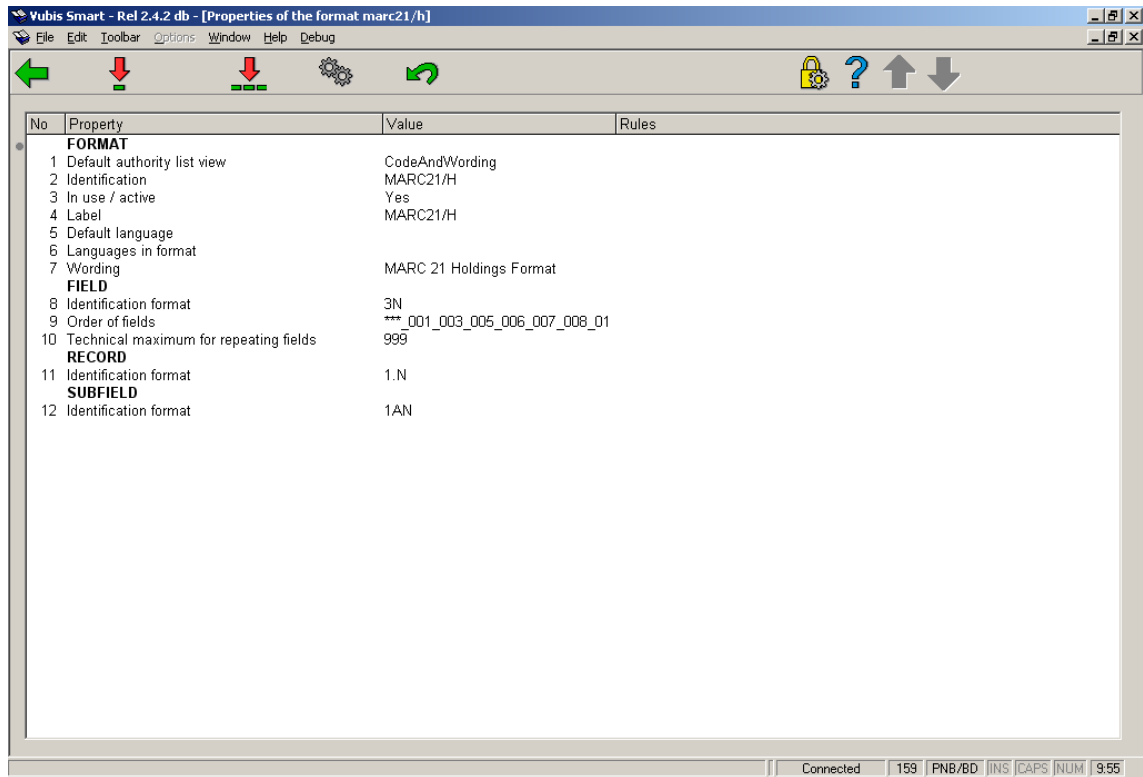


No	Format	In use	Wording
1	MARC21/H	Yes	MARC 21 Holdings Format
2	UNIMARC/H	Yes	UniMarc/H

Each format has its own properties. You can view these by selecting a format and then clicking on the icon **View properties of format**.

You can then change these properties by clicking on the icon **Change all properties**.

In the screen below you can change the general properties of a format. Normally it is not necessary to do this. Only when you design your own format will you need to do this.



A description of the properties shown on this screen:

Property	Description
Default authority list view	The way in which <i>authority lists</i> can be presented. You can choose between code only or code plus wording. For more information see the chapter on Authorities.
Identification	The name of the format. You can not change this after the format has been defined.
In use / active	You can tick a box to denote the format can be used. You cannot create a database with an inactive format.
Label	The name of the format as presented in lists etc. The label can be changed.
Default language	The language in which cataloguing will be done in special cases where a specific language cannot be defined.

Languages in format	Vubis Smart supports multilingual fields, e.g. subject headings in multiple languages. Here you define which languages can be used.
Wording	Free text description of the format.
Identification format (Field)	Here you define how fields are named. The notation '3N' in the example means 3 numeric characters.
Order of fields	This property is not in use.
Technical maximum for repeating fields	Repeatable fields are "infinitely" repeatable in theory; but for technical purposes there is a maximum, which is defined here.
Identification format (Record)	<p>Records in a database have an identification. Usually this is a number. Here you define how identification is done. The "1.N" in the example means an infinite number of numeric characters.</p> <p>If you were to put "1.4N" here it would mean that the number identifying a record can consist of a maximum of 4 numeric characters, i.e. a maximum of 9999. Which means you cannot enter more than 9999 records on the database.</p>
Identification format (Subfield)	The definition for this is similar to the identification of records. The "1AN" in the example means one alpha numeric or numeric character.

159.2.1 The fields

As an example the fields of the MARC21/H format are shown. You can display this list by double clicking on the format in the overview screen.

No	Field	Wording	Type	Mand.	Max.	In use	Subfields	Rules
1	***	Leader	Text	No	1	Yes	*101,*106,*107,*108,*109,*110,	No
2	001	Control number	Text	No	1	Yes	*101,*102,*103,*104,*105,*106	No
3	003	Control number identifier	Text	No	1	Yes		No
4	004	CONTROL NUMBER FOR RELATED BIB	Text	No	1	Yes		No
5	005	Date and time of latest transaction	Text	No	1	Yes		No
6	007	Physical description fixed field	Text	No	1	Yes		No
7	007[ER]	Physical description fixed field (Elec.Res.	Text	No	1	Yes	*101,*102,*103,*104,*105,*106,	No
8	007[Globe]	Physical description fixed field (Globe)	Text	No	1	Yes	*101,*102,*103,*104,*105,*106	No
9	007[Kit]	Physical description fixed field (Kit)	Text	No	1	Yes	*101,*102	No
10	007[Map]	Physical description fixed field (Map)	Text	No	1	Yes	*101,*102,*103,*104,*105,*106,	No
11	007[Micro]	Physical description fixed field (Microform	Text	No	1	Yes	*101,*102,*103,*104,*105,*106,	No
12	007[Motio]	Physical description fixed field (Motion Pi	Text	No	1	Yes	*101,*102,*103,*104,*105,*106,	No
13	007[Musi]	Physical description fixed field (Notated	Text	No	1	Yes	*101,*102	No
14	007[NPG]	Physical description fixed field (Nonprojec	Text	No	1	Yes	*101,*102,*103,*104,*105,*106	No
15	007[PG]	Physical description fixed field (Projected	Text	No	1	Yes	*101,*102,*103,*104,*105,*106,	No
16	007[RSI]	Physical description fixed field (Remote	Text	No	1	Yes	*101,*102,*103,*104,*105,*106,	No
17	007[Soun]	Physical description fixed field (Sound re	Text	No	1	Yes	*101,*102,*103,*104,*105,*106,	No
18	007[Tactil]	Physical description fixed field (Tactile M	Text	No	1	Yes	*101,*102,*103,*104,*105,*106,	No
19	007[Text]	Physical description fixed field (Text)	Text	No	1	Yes	*101,*102	No
20	007[Unsp]	Physical description fixed field (Unspecifi	Text	No	1	Yes	*101,*102	No
21	007[Video]	Physical description fixed field (Videoreco	Text	No	1	Yes	*101,*102,*103,*104,*105,*106,	No
22	008	Fixed length data elements	Text	No	1	Yes	*101,*107,*108,*109,*113,*114,	No
23	010	Library of Congress control number	Text	No	1	Yes	\$8,\$a,\$b,\$z,*1,*2	No
24	014	LINKAGE NUMBER	Text	No	999	Yes	\$6,\$a,\$b,\$z,*1,*2	No
25	016	National bibliographic agency control nu	Text	No	999	Yes	\$2,\$8,\$a,\$z,*1,*2	No
26	020	ISBN	Text	No	999	Yes	\$6,\$8,\$a,\$c,\$z,*1,*2	No
27	022	ISSN	Text	No	999	Yes	\$6,\$8,\$a,\$y,\$z,*1,*2	No
28	024	Other standard identifier	Text	No	999	Yes	\$2,\$6,\$8,\$a,\$c,\$d,\$z,*1,*2	No
29	027	Standard technical report number	Text	No	999	Yes	\$6,\$8,\$a,\$z,*1,*2	No
30	030	Coden designation	Text	No	999	Yes	\$6,\$8,\$a,\$z,*1,*2	No

Fields on the screen

No: The sequence number on the screen. This bears no relation to the format structure.

Field: The coded field name. In the MARC21 and UniMarc formats these codes consist of 3 numbers; the field names therefor are 001 through 999.

Wording : A description of the fields.

Type: The type of field. In most cases this will be "Text", but it can also be another of the 11 types available within Vubis Smart.

Mandatory : Denotes whether or not a particular field is mandatory when creating a record.

Max.: The maximum number of times a field may be repeated within a record.

In use: Whether or not the field is in use. With this you can disallow use of a field within removing it from the format.

Subfields: A list of subfields valid for each field. Subfields have a coded name consisting of a number or letter prefixed by a \$ sign.

Rules: For each field rules can be defined. E.g. "if field X exists then this field is mandatory". Several common formats such as MARC21 use such rule sets.

Options on the screen

New field: Use this option to add a new field. An input form will be displayed.

View subfields of field: Select a field and then this option to view the subfields. See section 159.2.1.2.

Delete field: Select a field and then this option to delete it. The system asks for confirmation.

Copy field: Select a field and then this option to create a new field based on characteristics of the selected field.

Element/Group profiles: These profiles can be used in many areas of the system to ensure a uniform output of data. The element/group profiles are used in the SSP module, the catalogue, printing of notices etc. The idea behind these profiles is that you only need to define a profile once, which can then be used infinitely. The advantage is that you can define multiple profiles to format 'raw' data for use in various modules and parts of the system (see the next section for an overview). Examples are the definition of an ISBD profile or other complex presentations which can be used in SSP output. You can also use profiles to determine how titles are displayed in the system. This gives you full control over the display of data throughout the system. See the help for AFO 151 for a detailed explanation.

View properties of field: Select a field and then this option to view its properties. See section 159.2.1.1.

View/define rules for field instance: This option is not relevant for the holdings format.

View properties of format. This is the same as the option **View properties of format** on the overview screen of holdings formats

Jum to screen containing field: Use this option to quickly jump to a particular place. An input form will be displayed.

159.2.1.1 The properties of a field

After choosing the option to display properties of a field the system shows the following screen. In the example field 852 (location) of the MARC21/H format is chosen:

Vubis Smart - Rel 2.4.2 db - [Properties of field '852' for format 'marc21/h']

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No	Property	Value	Rules
GENERAL			
1	Comments and notes		
2	Data type	Text	
3	Definition	Identifies the organization holding t	
4	Examples		
Identification			
5	In use / active	Yes	
6	Punctuation after field		No
7	Punctuation before field		No
8	Label	Location	
9	Language dependant	No	
10	Mandatory	No	No
11	Maximum number	999	No
12	Minimum number	0	No
13	Standard field	Yes	
14	Unique value	No	No
15	Wording	Location	
FORMAT			
16	Right justified	No	
17	Default		
18	Fill character		
19	Fixed length	No	
20	Format pattern		No
21	Format test		No
22	Generated data		No
23	Maximum length		No
24	Minimum length		No
25	Modification allowed	Yes	
26	Valid values		No
RELATIONS			

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Vubis Smart - Rel 2.4.2 db - [Properties of field '852' for format 'marc21/h']

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No	Property	Value	Rules
27	Relation to (default)		
28	Authority generation profile(
29	Order of subfields		
30	Related fields		
31	Viewer		
32	Viewer table		

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159.2.1.2 Subfields and their properties

From the overview screen of a format select a field and choose the option **View subfields of field** (or double click on a field) to display the subfields defined for that particular field:

No	Subfield	Wording	Type	Mand.	Max.	In use
1	\$2	Source of classification or shelving sche	Text	No	1	Yes
2	\$3	Materials specified	Text	No	1	Yes
3	\$6	Linkage	Text	No	1	Yes
4	\$8	Field link and sequence number	Text	No	1	Yes
5	\$a	Location	Text	No	1	Yes
6	\$b	Sublocation or collection	Text	No	999	Yes
7	\$c	Shelving location	Text	No	999	Yes
8	\$e	Address	Text	No	999	Yes
9	\$f	Coded location qualifier	Text	No	999	Yes
10	\$g	Non-coded location qualifier	Text	No	999	Yes
11	\$h	Classification part	Text	No	1	Yes
12	\$i	Item part	Text	No	999	Yes
13	\$j	Shelving control number	Text	No	1	Yes
14	\$k	Call number prefix	Text	No	1	Yes
15	\$l	Shelving form of title	Text	No	1	Yes
16	\$m	Call number suffix	Text	No	1	Yes
17	\$n	Country code	Text	No	1	Yes
18	\$p	Piece designation	Text	No	1	Yes
19	\$q	Piece physical condition	Text	No	1	Yes
20	\$s	Copyright article-fee code	Text	No	999	Yes
21	\$t	Copy number	Text	No	1	Yes
22	\$x	Nonpublic note	Text	No	999	Yes
23	\$z	Public note	Text	No	999	Yes
24	*1	Shelving scheme	Indicator	No	999	Yes
25	*2	Shelving order	Indicator	No	999	Yes

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By double clicking on a subfield you can look at the properties of that particular subfield. The properties of a subfield are similar to those of a field. Changing them is done in the same way as for fields. See section 159.2.1 for a description of the column headings on the screen displayed above.

159.3 Databases

When choosing the second option from the AFO 159 main menu – Databases – a list is shown of databases already defined:

Vubis Smart - Rel 2.4.2 db - [Defined holdings databases]

No.	Database Id	Wording	Format	In use
1	MARC21/H	DB MARC21/H	MARC21/H	Yes
2	UNIMARC/H	DB UNIMARC/H	UNIMARC/H	Yes

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Doubleclick on a database to view its properties:

Vubis Smart - Rel 2.4.2 db - [Properties for database 'marc21/h']

No.	Type	Data
General		
1	Database number	MARC21/H
	Directory	
	Database name	DB MARC21/H
	Database format	MARC 21 Holdings Format
	Comments and notes	
	Record counter	
	In use	Yes
	Number of copies to store	1
	Include archive file	Yes
	New record creation allowed	Yes
	Changes to records allowed	Yes

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The various properties of a Vubis Smart holdings database in AFO 159:

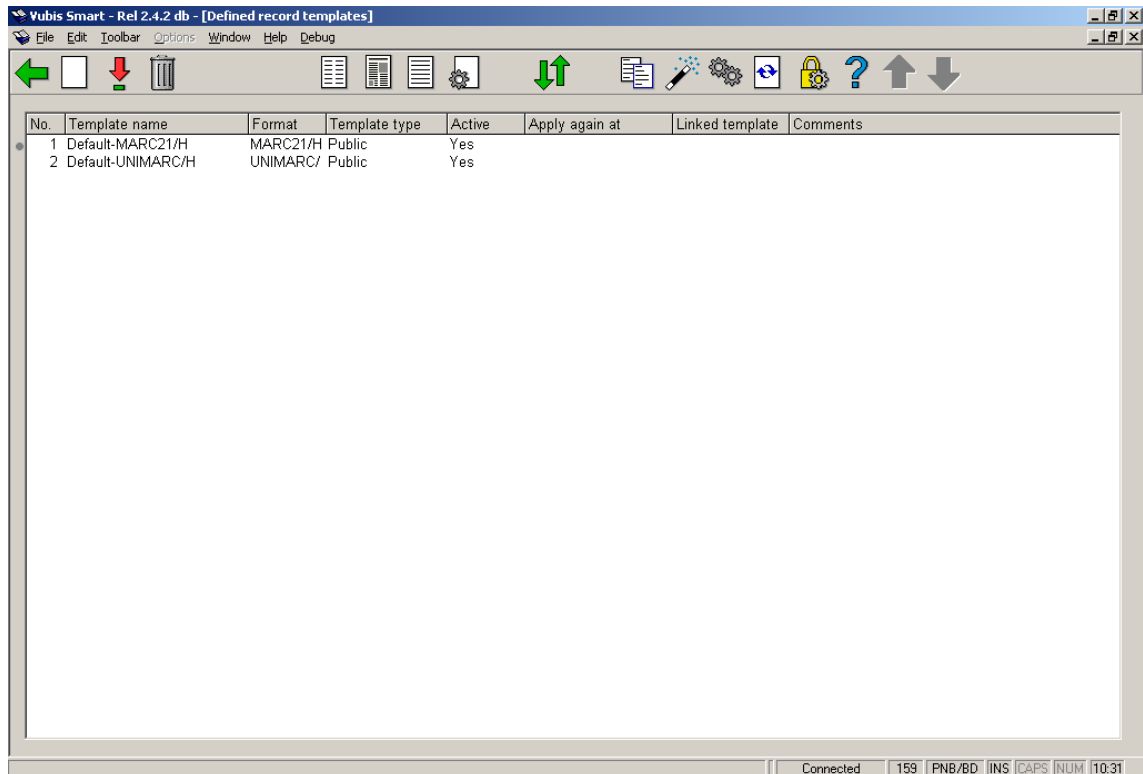
Property	Description
Number	The database identification number. Number 1 is always a system database. When creating a new database a number is assigned automatically. It is not recommended to change this number (although it is possible on this screen).
Name	A short, descriptive name for the database.
Directory	The directory (called <i>namespace</i> within the Caché database server) where the database must be stored. U can choose a different directory/namespace from the current one, but that must be a correct Vubis Smart namespace.
Format	The holdings format for the database.
Comments and notes	Free text.
Record counter	<p>This is a sequence number for the holdings records in the database. For a new database this will always be zero. After you start using the database and fill it with records this counter will be incremented. It is possible to amend that counter here.</p> <p>Warning: never amend this counter for a database in use without consulting Geac staff first.</p>
In use	As long as this property has not been set, the database cannot be used. Later you can disable an existing database in this way, without having to physically remove it.
Number of copies to store	You can retain previous versions of edited holdings records. The number of version you wish to retain is specified here.
Include archive file	When a holdings record is deleted and this parameter is set to Yes, then the last version of that record will be stored in the archive file.

New record creation allowed	Whether or not creation of new records is allowed.
Changes to records allowed	Whether or not editing of records is allowed.

159.4 Templates

These templates appear when you select one of the shelfmark sets from the **Holdings statements for shelfmark sets** screen in AFO 111 and choose the option **Shelfmark set (MARC)** to update holdings information about the shelfmark set. This information includes copy number, physical format, shelving information, retention policy and notes about the shelfmark set. The options are the same as for bibliographic MARC editing but the editing applies to the holdings format (MARC21 or UNIMARC).

When choosing the third option from the AFO 159 main menu – Templates – a list is shown of templates already defined:



From the list of templates you can edit the properties of each template. To do so select a template and then click on one of the icons described below.

Click on **View classes** to edit the presentation style for each element of the template. These elements are: normal text, field labels, subfield labels and four types of data. What you can change is: the display colour and whether or not the display should be in bold and/or italics.

Click on **View columns** to edit the presentation of the various columns. The columns are: General, Fields, Indicators, Subfields and Data. When you double click on one of them you can amend the following properties:

- Whether you want to display the code or the label (that is the full name, wording).
- What the edit mode is: Insert, No change allowed, Overwrite.
- The maximum width of the column (in number of characters).
- The characters that are allowed in the column. When nothing is entered here, all characters are valid.
- Substitution character.

Click on **View fields/subfields** to change the field labels for the languages Dutch, English and French. Note that you only change the wording as used in the template, not the wording within the format. You can do this for both fields and subfields.

Click on **General information template** to set certain parameters that could also be set on creation of the template. These are: whether the template is private or public, comments, whether the template is available in the cataloguing module, when the template must be re-applied.

Click on **Replace selected template** to replace the contents of the selected template with the contents of another template (which can be selected from a dropdown list).

The icon **Copy template** is similar to **Replace selected template**, the difference being that you copy the contents of the selected template to a new template.

Click on **Parameters** to set how the fields and subfields must be displayed in the dropdown list that is presented when adding a new (sub)field. The choice is between 'first text then code' and 'first code, then text'.

Click on **Check the templates** to check no conflicts with the defined format exist.

- **Document control - Change History**

Version	Date	Change description	Author
<i>1.0</i>	<i>July 2006</i>	<i>creation (as part of item maintenance for release 2.4.2 serials modifications)</i>	